

Date/Time Stamp:

Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)
 American Public Transportation Association (APTA)

Private Sponsor(s) (list all): _____

November 8, 2021

Travel date(s): _____

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$356.19	NA	\$53.33	
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

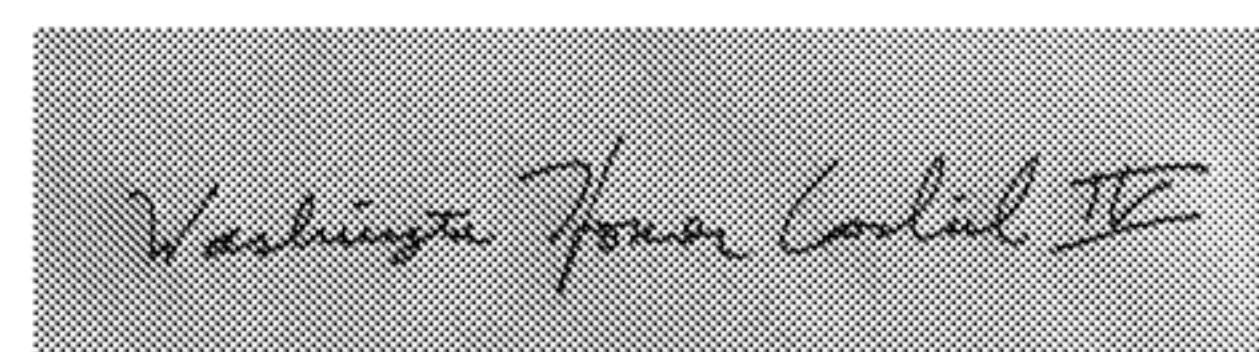
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. *See* Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): Attended APTA TRANSform Conference on 11/8/21, which consisted of visiting the EXPO floor after arrival in the morning, attended the "Federal Partners" general session in the afternoon, and then I was a panelist in the

"Congress and the Year Ahead on Infrastructure Investment" session to close the day.

12/3/21
(Date)

W. Homer Carlisle
(Printed name of traveler)



(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses under Rule 35.

12/3/21
(Date)



(Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics** in **SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Washington Homer Carlisle

Name of Traveler: _____

Employing Office/Committee: _____
Committee on Banking, Housing & Urban Affairs

Private Sponsor(s) (list all): _____
American Public Transportation Association (APTA)

Travel date(s): _____
November 8, 2021

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): _____
APTA Transform Conference & Expo, Orlando, FL

Explain how this trip is specifically connected to the traveler's official or representational duties:

I am Chairman Brown's lead staff for public transportation issues, which fall under the Banking & Housing committee's jurisdiction. I will be traveling to participate in panel session featuring House and Senate staff to discuss transit funding and reauthorization of federal transit programs included in the infrastructure legislation passed by the Senate in August. The panel will also discuss other legislation of interest to the public transit industry. I will also attend sessions related to transportation policy and visit the exposition hall during my visit to APTA's Transform Conference & Expo.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

10/8/21
(Date)

W. Homer Carlisle
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Chairman Sherrod Brown

Washington Homer Carlisle

I, _____ hereby authorize _____
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

10/8/21
(Date)

Sherrod Brown
(Signature of Supervising Senator/Officer)

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☒ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

APTA is the sole sponsor and organized and conducted the event.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

To strengthen and advance public transportation. The trip provides education and information

sharing opportunities between the staffer and a broad spectrum of the public transportation industry.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

APTA has sponsored similar trips annually for more than 20 years.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Each year, APTA presents conferences and webinars. Each event is developed to improve the knowledge, professional and technical skills, and networking opportunities for public transportation officials at all levels.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$97.38 - Air Fare \$43.92 - Taxi Fare	\$229/night-tax not included	\$99	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

a) without regard to congressional participation.

18. Reason for selecting the location of the event or trip

The location was pre-selected by APTA's members through a committee process. (See addendum for the completion of item 18.)

19. Name and location of hotel or other lodging facility:

Rosen Centre, Orlando, FL

20. Reason(s) for selecting hotel or other lodging facility:

The hotel was selected for its proximity to the meeting's location, it's an adequate facility to host a conference, and its pricing is competitive.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Lodging expenses are \$229, above the federal per diem of \$129.

Meal expenses are \$99 for one day and one travel day, this total is the combination of the daily per diem of \$49.50 for the first and last travel day.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

The type of travel provided will be an airplane, economy class.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

n/a

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor:

Paul P. Skoutelas

Name and Title: Paul P. Skoutelas, President and CEO

Name of Organization: American Public Transportation Association (APTA)

Address: 1300 I Street, NW Suite 1200 East, Washington, DC 20005

Telephone Number: (202) 496-4889

Fax Number:

E-mail Address: pskoutelas@apta.com

Addendums for Senate Private Sponsor Travel Certification Form-2021 APTA TRANSform Conference and EXPO

Addendum to item #5:

Homer Carlisle, Professional Staff Member

Nicole Christus, Professional Staff Member

Kara Fischer, Senior Counsel

Rebecca Higgins, Senior Policy Adviser

Andrew Neely, Deputy Policy Director

Addendum to item #18:

This location benefits all conference attendees without consideration to congressional staffers.

Congressional Staff Itinerary: APTA 2021 TRANSform Conference and EXPO Orlando, FL;

			Sunday, November 7, 2021
5:40 PM	8:04 PM		Arrival at Orlando International Airport (Orlando) UA 2268
9:00 PM	9:30 PM	30 minutes	Dinner
			Monday, November 8, 2021
8:00 AM	8:30 AM	30 minutes	Breakfast
8:30 AM	10:00 AM	1.5 hours	OPENING GENERAL SESSION WITH KEYNOTE Featuring Dr. Cady Coleman Former NASA Astronaut and U.S. Air Force Colonel
10:00 AM	10:30 AM	30 minutes	Break
10:30 AM	12:30 PM	2 hours	EXPO 2021 Exhibitors will showcase products, technologies, and services designed to improve public safety, enhance the passenger experience, increase sustainability, and improve efficiencies and profitability in the public transportation system. There will be four Learning Zones on the EXPO show floor where attendees can learn about the latest innovations that will help systems operate more efficiently. The learning zones include, Innovations Learning Zone, Solutions Learning Zone, Procurement Learning Zone, and Hot Topics Learning Zone.
12:30 PM	1:30 PM	1 hour	Lunch
1:30 PM	3:00 PM	1.5 hours	General Session: Federal Partners Update
3:00 PM	3:30 PM	30 minutes	Break
3:30 PM	5:00 PM	1.5 hours	Congress and the Year Ahead on Infrastructure Investment This session focuses on the Infrastructure Investment and Jobs Act, the Build Back Better Act, Transportation Appropriations, and implementation of critical infrastructure investment. Introduction TBA Congressional Staff Panel (This discussion is off the record and not for attribution.) Moderator to be announced Panelists Homer Carlisle, Professional Staff Member, Senate Committee on Banking, Housing and Urban Affairs (Invited) Nicole Christus, Professional Staff Member, Senate Committee on Banking, Housing, and Urban Affairs (Invited) Drew Feeley, Staff Director, House Committee on Transportation and Infrastructure (Invited) Kara Fischer, Senior Counsel, Senate Committee on Commerce, Science, and Transportation (Invited) Rebecca Higgins, Senior Policy Adviser, Senate Committee on Environment and Public Works (Invited) Andrew Neely, Deputy Policy Director, Senate Committee on Commerce, Science, and Transportation (Invited) Jackie Schmitz, Professional Staff Member, House Committee on Transportation and Infrastructure (Invited) Cheryle Tucker, Senior Professional Staff Member, House Committee on Transportation and Infrastructure (Invited)
5:00 PM	6:00 PM	1 hour	Dinner
8:25 PM	10:35 PM		Departure from Orlando International Airport (Orlando) Southwest 5859



**AMERICAN
PUBLIC
TRANSPORTATION
ASSOCIATION**

September 16, 2021

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APTA.COM

Mr. Homer Carlisle
Professional Staff Member
Senate Committee on Banking, Housing and Urban Affairs
Senate Subcommittee on Housing, Transportation,
and Community Development
534 Dirksen Senate Office Building
Washington, DC 20510

Dear Mr. Carlisle:

On behalf of America's public transportation industry, which directly employs more than 448,000 workers and supports millions of private-sector jobs, it is my pleasure to invite you to APTA's 2021 TRANSform Conference and EXPO to be held November 7-10, 2021, in Orlando, FL.

In particular, we invite you to participate in the congressional staff session: "Congress and the Year Ahead on Infrastructure Investment". This session is scheduled for Monday, November 8, at 3:30 p.m. This session will provide a good opportunity to discuss infrastructure investment legislation and implementation, as well as your committee's priorities for the remainder of the 117th Congress. We also invite you to attend any of the other educational sessions at the conference.

We expect thousands of public-sector and private industry transit professionals will join us at the Conference. The EXPO will showcase nearly 600 transit suppliers, manufacturers, and businesses on which our industry depends. TRANSform will provide the platform for critical discussions about moving forward from the pandemic, growing ridership, and effectively and efficiently using the significant new funding made available by Congress for the pandemic and in the pending infrastructure bill.

APTA will provide you with hotel accommodations and meals, as well as roundtrip air fare between Washington, DC, and Orlando, FL, in accordance with congressional ethics rules. We will follow up with additional information as necessary to facilitate approval from the Committee on Ethics.

I want to assure you that your health is our top priority. APTA is closely monitoring the safety protocols in use by the meetings industry—particularly at large conferences—and will implement best practices to provide the safest possible conference experience.

Mr. Homer Carlisle
September 16, 2021
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To date, our plans include:

1. All participants will be required to provide proof of full COVID-19 vaccination, or a valid negative COVID-19 test within 72 hours of arrival. APTA is engaging a third party to implement and enforce this policy.
2. Regardless of vaccination status, all participants will be required to wear masks at all indoor events. Speakers may remove their masks while speaking but will be required to remain at least 6 feet from the audience.
3. The Orange County Convention Center (OCCC) in Orlando, home to EXPO, is an extremely large space with highly effective ventilation, room to spread out, and frequent cleaning and sanitizing.
4. APTA will encourage all participants to practice physical distancing whenever possible. Contactless badge pick-up will be available; meeting rooms will be set to avoid overcrowding; and decals indicating 6-foot physical distancing will be used in appropriate locations.
5. Best practices for safe food handling (e.g., boxed meals) will be followed at all food functions.

If you have any questions regarding the conference, please contact APTA's TaNeesha Johnson at tjohnson@apta.com. We plan to regularly update our website with the latest information on our TRANSform meeting protocol: [Meeting Safely](#).

Thank you in advance for considering this opportunity to discuss legislative issues of importance to APTA's members. We know our members would benefit greatly from your insights and the information you can share.

Sincerely,



Paul P. Skoutelas
President and CEO